CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 1 Reports - Query

This procedure demonstrates the functions of the CM/ECF Query feature. This feature allows access to case information, document images, attorney information, deadline and hearing information, and much more. Access to the query option requires a **PACER login and password. Once logged in the system will not prompt you for the pacer login, password unless you log out of the system.**

STEP 1   Select **Query** from the main menu.

STEP 2   The **PACER** login screen will display.   Enter your login/password. Click **Login. NOTE** - We do not recommend clicking on the check box at *"Make this my default PACER login."*

STEP 3   The **Query** search screen will display. The options listed on the screen are the Search Clues.

♦   Enter the information upon which the Query Search should be based. For a case specific search enter a complete case number. If you know the party type, make a selection by using the drop down list.

♦   Click **Run Query** or **Clear** to return to the system's default.

♦   **Query Search using a name**: If the query finds more than one case that matched the name criteria, a list of matches will be presented. Click on the hypertext link for the desired match.

STEP 4   When a single case is identified, the Query menu is displayed. Some options, such as "Related Transactions", are themselves queries with further selection criteria (designated by "..." after the name).

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 1 Reports - Query

♦ Basic case information is listed at the top of the query menu screen. Click any hyperlink for additional options.

♦ **Alias** - Provides all, if any, aliases for the case.

♦ **Associated Cases** - Provides any associated cases, such as adversary proceedings or jointly administered cases.

♦ **Attorney** - Provides names, addresses, and phone numbers of the case attorneys and the party representation.

♦ **Case File Location** - Advises of the file location, if applicable.

♦ **Case Summary** - Provides primary case summary information; including (but not limited to) divisional venue, filed date, general case information, case status, pending status, list of parties, etc.

♦ **Creditor** - Displays a hypertext link to the Creditor Report which permits viewing of the creditor names and addresses.

♦ **Deadline/Schedule** - Provides a hypertext link which summarizes the status of any deadlines or hearings. A drop down list provides organization choices of how the data appears on the user's screen, and a button is provided to view the docket information and any links for each entry.

♦ **Docket Report** - Provides the case docket, and allows it to be displayed according to desired search criteria.

CM/ECF	Chapter IV
External User's Guide	Queries and Reports
	Section 1
U.S. Bankruptcy Court, Southern District of Florida	Reports - Query

♦ To access an NEF, place a check mark in the box

☑ Include links to Notice of Electronic Filing

♦ Click **Run Report**.

To access the NEF, click the silver ball preceding the document number.

12/14/2004	⦾4	Complaint by HighTower Inc against Bambi Poole. Filing Fee Paid. Nature of Suit: 424 (Obj/Revocation Discharge 727) (Attachments: # 1 Complaint Cover Sheet) (Shuler, Pam) (Entered: 12/14/2004)

♦ **Filers** - Provides the names and party type of all parties in the case, along with a hypertext link which provides a list of documents submitted by each filer.

The following are available within the document list:

a. Access to a document image is obtained by clicking on the document number hypertext link.

b. Access to a additional docket information can be obtained by clicking on the silver ball next to each document. **NOTE** - Within this link there is also a hypertext link to the document image.

♦ **History/Documents** - Provides a hypertext link to the docket entries which can display all or selected events with attached documents. Displaying the docket text is optional. The report can be sorted to show either oldest documents first, or to show the most recent documents first.

♦ **Notice of Bankruptcy Filing** - Provides a view of the official electronic notice of filing of a case. This document contains the court seal and may be re-printed at any time.

♦ **Party** - Provides names and addresses of all parties in the selected case, as well as their counsel.

3/01/05

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 1
U.S. Bankruptcy Court, Southern District of Florida	Reports - Query

♦   **Related Transactions** - Shows docket entries by group with other related docket entries. This option contains multiple search criteria, as well as links to docket text data and PDF images.

    a.   Access to a document image is obtained by clicking on the document number hypertext link.

    b.   Access to a the complete title of the document and any related entries click on the silver ball next to each document. NOTE - Within this process there is also a hypertext link to the document image.

♦   **Status** - Provides pending and terminated status information for the case.

♦   **Trustee** - Provides the name and address of the trustee assigned to the case.

CM/ECF	Chapter IV
External User's Guide	Queries and Reports
	Section 2
U.S. Bankruptcy Court, Southern District of Florida	Reports - Ballots

This procedure demonstrates the steps to create a Ballot Report.

STEP 1   Select **Reports** from the main menu.

STEP 2   Click on **Ballot Report**.

STEP 3   The **Ballot Report** screen will display.

♦   Enter the case number and a date range.   Click **Submit Report**.

Ballot Report

Case Number [   ] (YY-NNNNN)

Ballots filed between [01/01/2000] and [02/17/2005]

[Submit Report] [Clear]

STEP 4   The **Ballot Report** screen will display based on the criteria entered.

♦   The document number has a hyperlink to the PDF image of the ballot.
        Viewing the image require a PACER login.

Case Number: 04-11136-AJC
Joe Icon

Report Period: 1/1/2000 – 2/17/2005
Generated: 02/17/2005 11:30:14 by Shuler, Pam

Date Filed: 02/15/2005 *Filed By:* Creditor Grey Duck	*Document Number:*23 *Class:*A *Amount:* 100000 *Remarks:* ACCEPTED

Total Acceptance: 1
Total Rejections: 0
Total Unmarked: 0
Total: **1**

Report Selection Criteria

Case Number:	04-11136-AJC
Start Date	1/1/2000
End Date:	2/17/2005

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 3
U.S. Bankruptcy Court, Southern District of Florida	Reports - Calendar Events

This procedures describes the steps in which to print a Calendar Events report. This report provides a list of all scheduled events for both bankruptcy main and adversary cases. The user selects the criteria in which to run this report.

STEP 1   Select **Reports** from the main menu.

STEP 2   The **Reports Events** screen will display.

        ♦   Click **Calendar Events** and the following report options will display.

        ♦   For our example, a report will be run for a selected *judge*, *all hearings, office* and *using the calendar button select the date range*.   Click **Run Report**.

        ♦   **Case Number** - Enter the complete **Case Number** to obtain a report for a specific case. This is not a required field, the default is blank; leaving it blank will produce a report for all cases for other selected criteria.

        ♦   **Judge** - Scroll through the list to select and highlight the **Judge**, if desired. The default is blank, which means a report will include cases for all judges if none is specified. Select more than one judge by holding down the Ctrl key and clicking on additional judge names.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV 　　　　　Queries and Reports
	Section 3 　　　　　Reports - Calendar Events

♦ **Office** - The user must select and highlight an **Office**. Select more than one office by holding down the **Ctrl** key and clicking on additional offices.

♦ **Calendar Events** - The default is All Hearings. Other categories may be selected by scrolling through the list and highlighting a desired event. Select more than one event by holding down the Ctrl key and clicking on additional event names.

♦ **Set** - The **Set** field defaults to the current date or next working day. Enter the desired day or date range (can be past or future dates). Select **Both, AM or PM** and enter a **Time** if desired (default is blank and is not required). Leaving the time blank will result in a report containing all events, regardless of time, on the specific date selected.

♦ **Sort by** - The **Sort** field allows the report to be sorted by **Time**, or by **Office and Time**.

♦ Click **Run Report** or **Clear** to default to system's

STEP 3　　　The **Calendar Events Report** screen will display.

♦ The case number is a hyperlink to the docket. Viewing the docket requires a PACER login for access.

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 3
U.S. Bankruptcy Court, Southern District of Florida	Reports - Calendar Events

♦ Clicking on the silver ball next to the docket entry will display a Related Proceedings Report, which identifies any docket event(s) linked to this event. For our example, document 13 is related to document 12. Clicking on the document 12 hyperlink will provide the PDF image via a PACER login for access.

Related Proceedings Report

Case Number: **4-10148 Buzz Light Year Cafe (docket entries only)**

Filing Date # Docket Text

11/19/2004 13 (Re: [12] Amended Meeting of Creditors 11 & 12) Meeting of Creditors to be Held on 1/4/2005 at 09:30 AM at Room 102, Claude Pepper Federal Bldg. Proofs of Claim due by 4/4/2005. (USBC, NS)

Related Proceedings:

Filing Date # Docket Text

11/19/2004 12 (Re: [11] Meeting of Creditors Chapter 11) Meeting of Creditors to be Held on 1/4/2005 at 10:00 AM at Room 102, Claude Pepper Federal Bldg. Proofs of Claim due by 4/4/2005. (USBC, NS)

Calendar Text: RE: Doc #13; Amended Meeting of Creditors 11 & 12

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 4
U.S. Bankruptcy Court, Southern District of Florida	Reports - Cases

This procedure demonstrates the steps to create a Cases report. The information contained in the report can be used to monitor cases, utilizing different sort criteria.

STEP 1   Select **Reports** from the main menu.

STEP 2   The **Reports Events** screen will display. Click **Cases**.

STEP 3   The **PACER Login** screen will display. The user must enter their PACER login and password. Click **Login**. After gaining access, click **Cases**.

STEP 4   The **Cases Report** information screen will display. Selected desired criteria.

The following describe options designed to specify criteria for a user search. They will also serve to limit a search.

♦   **Office**, **Case Type**, **Chapter**, and **Trustee** - The default is blank which means all options are included. Make a selection from the drop down list by highlighting the desired item. A user may also select more than one item by holding down the **Ctrl** key and clicking on additional items.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 4 Reports - Cases

♦   **Date Type** - Select an option from the following drop down list. The list defaults to Filed Date, and only one option may be selected at one time.

```
Filed Date
Entered Date
Discharged Date
Dismissed Date
Closed Date
Converted Date
```
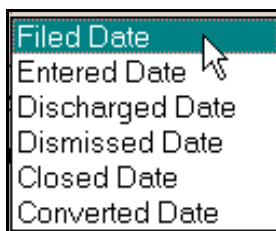
♦   **From/To** - Select a date range if desired. The default is the current date.

♦   **Open cases/Closed cases/Party Information** - The Open cases box is checked by default. If the user wants only closed cases, click on Open cases to "uncheck" the box, then click on Closed cases. Click on Party Information if this detail is desired. All can be checked at the same time if desired.

♦   **Sort by** - The report can be sorted by the following criteria. Up to three items may be selected. Filed Date is the default.

```
Filed Date
Entered Date
Case Number
Case Type
Office
Trustee
```

♦   **Output Format** - A **Formatted Display** is the default and is recommended.

♦   Click **Run Report** or **Clear** to reset defaults.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 4 Reports - Cases

STEP 5   The **Cases Report** screen will display with the case criteria as selected in the previous screen.

Cases Report for 2/16/2005

U.S. Bankruptcy Court

Southern District of Florida

Case No. Related Case Info	Tp	Ch	Party Info	Judge Trustee	Dates	Other Info
04-00105-PGH	mp		Drywall Specialties, Inc. v. Wexler	Hyman	*Filed:* 11/01/2004 *Entered:* 11/01/2004	*Office:* Fort Lauderdale
04-00106-PGH	mp		Wexler v. Drywall Specialties, Inc.	Hyman	*Filed:* 11/01/2004 *Entered:* 11/01/2004	*Office:* Fort Lauderdale
04-01098-RBR *Lead BK:* 04-11070-RBR Pamela L. O' Bright *Chapter:* 7	ap		Citibank SD v. Negron	Ray	*Filed:* 11/01/2004 *Entered:* 11/01/2004	*Office:* Fort Lauderdale

♦   The case number is a hyperlink to the docket sheet, in which the user can further define search criteria (see Docket Report procedures for more information).

STEP 6   To print the report, click on the browser's **Print** icon. The user may also navigate between screens by clicking on the browser's back and forward buttons.

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 5
	Reports - Claims Register
U.S. Bankruptcy Court, Southern District of Florida	

This procedure demonstrates the steps to create a Claims Register report.

STEP 1   Select **Reports** from the main menu.

STEP 2   The **Reports Events** screen will display. Click **Claims Register**.

STEP 3   The **PACER Login** screen will display. The user must enter their PACER login and password. Click **Login**.

STEP 4   The **Claims Register** information screen will display.

♦   **Case Number** - Enter the complete case number.

♦   **Creditor type/Creditor number** - This field defaults to blank, which means <u>all</u> creditors will be included in the report. Select and highlight a type from the drop down list to limit the report.   Note: Creditor number field, leave blank.

♦   **Creditor name** - Enter the name or first letter (or series of letters) to limit the report. The field is not case sensitive.

♦   **Claim number** - Enter a range of claim numbers to limit the report.

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	Section 5
U.S. Bankruptcy Court, Southern District of Florida	Reports - Claims Register

♦ **Filed/Entered** - The radio button for **Filed** is the default and it is recommended. Clicking on **Entered** will result in the report displaying the date each claim was filed.

♦ **Sort by** - This field defaults to **Claim Number** and **Filed Date**. Click on the drop down list to review additional sort options.

♦ Click on **Run Report** to generate the Claims Register or **Clear** to reset to system defaults.

STEP 5   The **Claims Register** screen will display.

♦ The **Case Number/Name** is a hyperlink to the docket sheet, and the **Claim Number** is a hyperlink to the claim image.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 5 Reports - Claims Register

♦ The **Claims Register Summary** will display at the bottom of the claims register and will contain claim amounts and totals of the claims selected.

Claims Register Summary

Case Name: John Smith
Case Number: 2004-10969-RAM
Chapter: 7
Date Filed: 10/17/2004
Total Number Of Claims: 1

	Total Amount Claimed	Total Amount Allowed
Unsecured	$5300.00	
Secured		
Priority		
Unknown		
Administrative		
Total	$5300.00	

CRITICAL ISSUE - Although claim amounts will be listed on the claims register, the user must verify actual dollar amounts and totals by viewing the imaged proof of claim.

STEP 6 To print the **Claims Register**, click on the **Print** icon in the browser's toolbar.

CM/ECF	Chapter IV
	Queries and Reports
External User's Guide	
	Section 6
U.S. Bankruptcy Court, Southern District of Florida	Reports - Creditor Mailing Matrix

This procedure demonstrates the steps to generate and print a Creditor Mailing Matrix for a single case, either in single-column label format, or as delimited data fields. Access to most CM/ECF reports requires a PACER login. Once logged into PACER, the system will not prompt the user to reenter a PACER login, password and client code until the current session is terminated by logging out of CM/ECF.

STEP 1   Select **Reports** from the main menu. This report can also be accessed by clicking on **Utilities** from the main menu, then selecting **Miscellaneous** → **Mailings...** → **Creditor Mailing Matrix**.

STEP 2   The **Report Events** screen will display.

♦   Click **Creditor Mailing Matrix**.

STEP 3   The **PACER Login** screen will display. Enter a PACER login and password. Click **Login**.

STEP 4   The **Creditor Mailing Matrix** screen will display.

♦   Enter the appropriate information. Choose a **Format**. Click **Run Report**.

STEP 5   The **Search Results** screen will display case creditor information and indicate the number of creditors. To print the report, click on the browser's **Print** icon.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 7 Reports - Docket Report

This procedure demonstrates the steps to create a Docket Report based on search criteria.

STEP 1   Select **Reports** from the main menu.

STEP 2   The **Reports Events** screen will display.

♦   Click **Docket Report**.

STEP 3   The **PACER Login** screen will display. The user must enter their PACER login
              and password. Click **Login**.

STEP 4   The **Docket Sheet** screen will display.

Docket Sheet

Case number _____

⊙ Filed
○ Entered   _____ to _____

Documents _____ to _____

☑ Include terminated parties
☐ Include links to Notice of Electronic Filing
⊙ HTML

○ Text
Sort by [Oldest date first ▼]
[Run Report] [Clear]

♦   **Case Number** - Enter the complete case number.

♦   **Filed/Entered** - The **Filed** radio button is the default and is the
         recommended format to view the case docket. Selecting **Entered** will
         display the case docket arranged in order of the dates documents were
         entered into the system).

♦   **Documents** - Leave the fields blank if a full docket is requested.
         Otherwise, a user may limit the report to document numbers within a
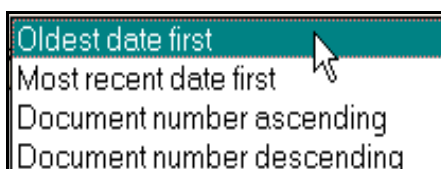   number range.

♦   **Links** - The report defaults to **Include Terminated parties** (recommended). To access an NEF, place a check mark in the box.

☑ Include links to Notice of Electronic Filing

♦   To view the NEF, click the silver ball preceding the document number.

12/14/2004	●4	Complaint by HighTower Inc against Bambi Poole. Filing Fee Paid. Nature of Suit: 424 (Obj/Revocation Discharge 727) (Attachments: # 1 Complaint Cover Sheet) (Shuler, Pam) (Entered: 12/14/2004)

♦   **HTML** - The report defaults to **HTML** (recommended).

♦   **Sort by** - Click on the drop down list to highlight the desired criteria, which defaults to **"Oldest date first"** which is the system default (recommended). Click on the drop down list to select other sort choices.

```
Oldest date first
Most recent date first
Document number ascending
Document number descending
```

STEP 4   The **Docket Report** screen will display according to the selected criteria.

♦   Scroll through the docket report as desired.

♦   Clicking on any document number hyperlink will display the PDF image. Our example below has an one attachment which was appended to the document filed (Attachments: # 1), and will also appear inside the docket text as a hyperlink.

10/27/2004	●10	Amended Schedules Schedule D, E & F Filed by Debtor John Smith . (Attachments: # 1 Local Form 4) (Cradic, Cam) (Entered: 10/28/2004)

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 7 Reports - Docket Report

♦   The option to view Notices of Electronic Filing was selected, and a silver ball will appear next to the document number hyperlink. Click on the ball to view the NEF.

10/27/2004	10	Amended Schedules Schedule D, E & F Filed by Debtor John Smith . (Attachments: # 1 Local Form 4) (Cradic, Cam) (Entered: 10/28/2004)

♦   The Select Receipt Type screen will display. The **Html** version is the default. Click **Display Receipt** to view the NEF.

Select Receipt Type.

⦿ Html Version
○ Text Version

Display Receipt   Clear

STEP 5   To print the docket or Notice of Electronic Filing, click on the browser's **Print** icon. The user may also navigate between screens by clicking on the browser's back and forward buttons.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 8 Reports - Order Query

The Order Query function will allow a registered user to query the status (by case number) of an electronically submitted order. All <u>proposed</u> orders associated with the case number will be displayed in the report.

STEP 1   Click **Reports**.

STEP 2   Click **Order Query**.

STEP 3   Enter a case number. Click **Next**.

Query Order Status

Case Number 05-10153   Examples: 99-12345, 1:99-bk-12345 or 1-99-bk-12345; 99-1234, 1:99-ap-1234 or 1-99-ap-1234

Next   Clear

STEP 4   Pending Orders Report: All pending orders associated with the case number which was entered in the above field will display.

Case Number	Related Doc#	Order	Type	Description	Submission Date	Submitter	Status
05-10153-AJC	4	198.pdf	Hearing Held	Motion to Dismiss Case	02/17/2005	Joe Falzone	Being Processed
05-10153-AJC	3	199.pdf	Agreed	Motion for Adequate Protection	02/17/2005	Joe Falzone	Being Processed

Clicking on the **Case Number** or **Related Doc#** hyperlink will prompt for the user's PACER login. However, the user may view (free of charge) any pending unsigned order.

Orders will no longer display on the report subsequent to judicial action.

CM/ECF **External User's Guide** U.S. Bankruptcy Court, Southern District of Florida	Chapter IV Queries and Reports
	Section 9 Reports - PACER Login

This procedure demonstrates the steps to take to run and print ECF Reports. The majority of the reports require that the user log into PACER. Once logged in, you will not be asked again for the Login, Password, and Client Code. If you wish to change to a different Client Code click on **Logout** from the main menu, then log back into ECF. A new PACER login screen will be displayed screen.

We ask that you do not run reports between the hours of 10:00 AM and 3:00 PM. This is the heaviest processing time and will slow the system for both internal and external users.

STEP 1   Click on **Reports** from the main menu.

STEP 2   The **Report Events** screen will display the following reports.

      ♦   Cases

      ♦   Claims Register

      ♦   Docket Report

      ♦   Calendar Events (non billable report)

      ♦   Creditor Mailing Matrix

      ♦   Order Query (non billable report)

      ♦   Ballot Report (non billable report)

STEP 3   Select the desired report. Click **Next**. The **PACER** Login screen will display.

PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at http://pacer.psc.uscourts.gov or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of $.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication
Login: [   ]

Password: [   ]

Client code: [   ]

☐ Make this my default PACER login

[Login] [Reset]

| CM/ECF

External User's Guide

U.S. Bankruptcy Court, Southern District of Florida | Chapter IV
      Queries and Reports |
| | Section 9
      Reports - PACER Login |

STEP 4   Enter the following:

      A.   Login
      B.   Password
      C.   Client code (if applicable)

      NOTE - It is not recommended that the user click on the check box to make these entries a default PACER login.

STEP 5   Click **Login**.